

Payment information and nomination

Defined benefit (post-1988) account



Please use a dark pen and CAPITAL letters. Insert (X) when you have to choose an option.

If you have any questions, please call us on 1300 650 873.

1. Your personal details

Member number	Account number	Date of birth	
<input type="text"/>	<input type="text"/> F <input type="text"/> S <input type="text"/> S <input type="text"/> U <input type="text"/>	<input type="text"/>	<input type="text"/>
Title	Last name		
<input type="text"/>	<input type="text"/>		
Given name(s)			
<input type="text"/>			
Address			
<input type="text"/>			
Suburb	State	Postcode	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Daytime contact number	Mobile number	M	F
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Email (for security reasons, please ensure that your nominated email address is your personal email address and not a role-based email address such as employee_title@company.com.au)			
<input type="text"/>			



Last pay period end date

This is the final contribution payroll period for the defined benefit member. This is not the date that the contribution will be paid to the Fund.

2. Cease date (this section is to be filled in by your HR or Payroll Officer)

This section is required to be completed by your employer if you:

- have recently ceased employment
- are forfeiting the scheme
- are aged 65 and over but still working

Last pay period end date (DD-MM-YYYY)

Name of organisation

Employer code

HR/payroll officer's name

HR/payroll officer's signature

Date (DD-MM-YYYY)



3. Reason for cessation

Select (X) one option only

- I have ceased employment with my defined benefit employer but not retired from the workforce

Date ceased employment
 - -

- I am under 55 and been made redundant (genuine redundancy) from my defined benefit employer

Redundancy date
 - -

- I have reached my preservation age and permanently retired from the workforce

Retirement date
 - -

- I am still working for my defined benefit employer, but wish to close (forfeit) my account

- I am aged 65 years or over

Date of birth	Preservation age
Before 1 July 1960	55
1 July 1960 to 30 June 1961	56
1 July 1961 to 30 June 1962	57
1 July 1962 to 30 June 1963	58
1 July 1963 to 30 June 1964	59
1 July 1964 or after	60

i Certifying your identity

Before we can process your request, the trustee must be absolutely certain of your identity which is why we require certified copies of documents confirming your identity. Please refer to *Proof of identity* fact sheet for details of acceptable forms of documentation. Please note if an incorrect document/information is provided, it may delay processing your request.

4. Payment instructions (please select one option only)

Note: If you are forfeiting the scheme or you are under age 55 and resigning, there may be a deferred benefit as part of your benefit. Any deferred benefit will be transferred to a Deferred account and are subject to preservation and fund rules. If you would like to access/transfer your deferred benefit, please also complete a deferred form.

Select (X) one option only

1. Transfer my lump sum to my Aware Super accumulation account** OR;
2. Transfer my lump sum to an external superannuation fund or self-managed super fund (SMSF)

Fund or SMSF name

Fund or SMSF address

Suburb State Postcode

Australian Business Number (ABN)

Please provide at least one of the following:

Unique Superannuation Identifier (USI)

Membership number for your nominated fund

** Amounts transferred to your accumulation account with the fund will receive investment returns (positive or negative) in accordance with the investment option(s) applicable to your accumulation account, effective from the date of transfer.

3. Transfer my available* entitlement to my bank account or to my SMSF account

* Accessing lump sum benefits are subject to preservation status and satisfying a condition of release. If this option is selected and you are ineligible to access part/whole of the funds, the remaining funds (preserved) will be transferred to your accumulation account.

Account name

BSB number Account number

Name of financial institution

Branch

i Bank details

The bank account must be in your name and a copy of your statement or passbook showing your full name, address and account details must be provided if this option is selected. If you do not provide a bank statement, then payment will be made by cheque to your current postal address.

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